




# HR FIELDS AND WHAT THEY IMPACT

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## Session Topics

- Welcome & Introductions (5 min)
- Instruction (20 min)
  - Where did it come from? Where did it go?
    - Names and Email Addresses
  - The “Hub” of Connections
  - Who, What, and Where
  - The “Matrix”
- Activity and Review (15 min)
- Discussion (15 min)
- Wrap up & Closing (5 min)

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## Introductions

- Table Introductions
  - Introduce yourself to everyone at your table
  - Give your department
  - Share your nickname(s)
- Room Introductions
  - 1 or 2 people from each table
  - Introduce yourself to everyone at your table
  - Give your department
  - Share your nickname(s)

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## Question: Personal Data

- How many places can names and email addresses be added and updated in PeopleSoft?
  
- **Bonus question:** Where can each be updated?

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## Where did it come from?

- Personal Information
  - Primary Names
  - Email Addresses
- Additional Names (Types)
  - Primary Name
  - Warrant Name
  - Preferred Name
- User (System) Profile
  - User Profile name (CRC)
  - User Email Addresses (Employee Self-Service)

## Where did it come from?

- (District) Personal Information
  - Main Menu > Workforce Administration> Personal Information > Personal Information : Biographical Details
    - Personal ID
    - Display Name (Primary Name)/Legal Name
    - Must notify Retirement with copy of Social Security Card

The screenshot shows a web form with three tabs: 'Biographical Details' (highlighted in red), 'Contact Information', and 'Regional'. The form displays the following information:

- Name:** Morris Day (highlighted in yellow)
- Person ID:** 614109 (highlighted in yellow)
- Effective Date:** 08/07/2017
- Format Type:** English
- Display Name:** Morris Day (highlighted in yellow)
- View Name:** A button with a dotted border.

Navigation controls include 'Find | View All', 'First', '1 of 1', and 'Last'.

## Where did it come from?

### ■ (District) Personal Information

- Main Menu > Workforce Administration > Personal Information > Personal Information : Contact Information
  - Email Types: Business, Home
  - Can be modified by users directly through ESS

Biographical Details **Contact Information** Regional

**Morris Day** Empl ID 614109

Current Addresses Personalize | Find | View All | First 1 of 1 Last

Address Type	As Of Date	Status	Address
Home	10/06/2017	A	12345 Main Street San Diego, CA 92101 USA

Phone Information Personalize | Find | View All | First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred
Business	619/555-5678		<input checked="" type="checkbox"/>

Email Addresses Personalize | Find | View All | First 1-2 of 2 Last

*Email Type	*Email Address	Preferred
Business	morris.day@edcoe.net	<input checked="" type="checkbox"/>
Home	morristheman@gmail.com	<input type="checkbox"/>

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## Where did it come from?

### ■ (District) Additional Names

- Main Menu > Workforce Administration > Personal Information > Biographical > Additional Names
- Name Types
  - Primary, Warrant, Preferred

Additional Names

**Morris Day** Person ID 614109

Current Names Personalize | Find | View All | First 1-3 of 3 Last

	Type of Name	As Of Date	Name	Status
1	Primary	08/07/2017	Day, Morris	Active
2	Warrant	08/08/2017	Day, Maurice	Active
3	Preferred	08/07/2017	Day, Mo	Active

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## Where did it come from?

### ■ User (System) Profile

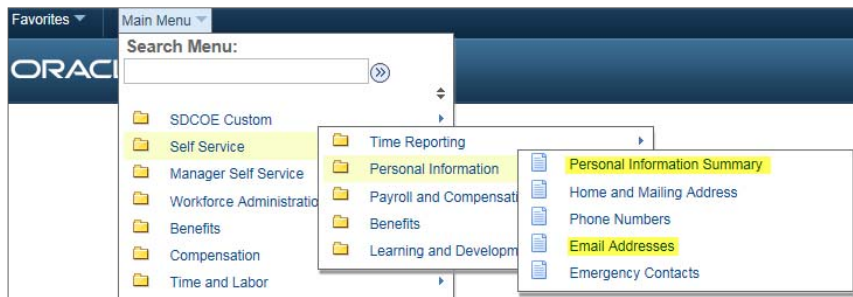
- Name (Description): Created and Maintained by CRC
- User can manage email and other personal information in PeopleSoft Employee Self Service (ESS): Accessibility is District Specific
  - Personal Information: Email Addresses
  - HCM – Main Menu > My (System) Profile



## Where did it come from?

### ■ (User) PeopleSoft Self Service: Personal Information

- Accessibility is District Specific



## Where did it go?

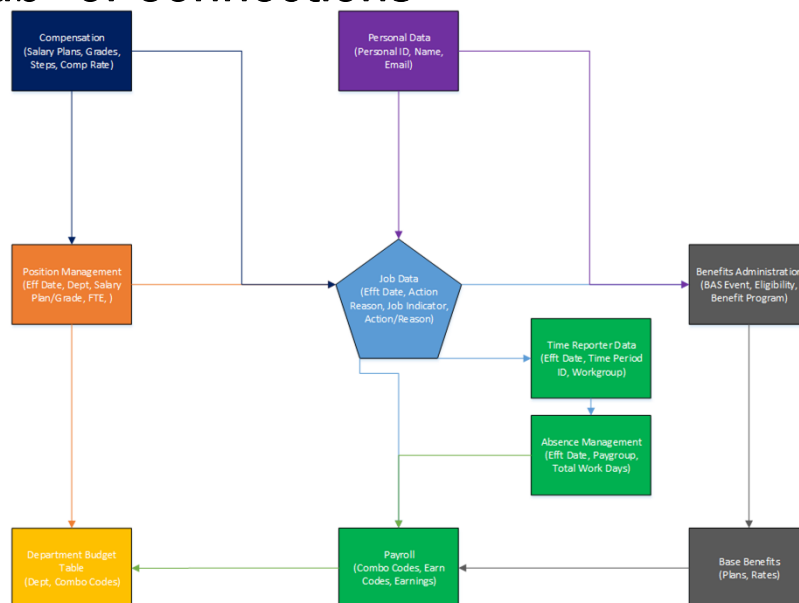
### ■ Names

- Primary Name - Outside of check, W2, Actual Check (if no warrant name) and Top of paystub (if no warrant name)
- Warrant Name - Actual Check, Top of Paystub
- Preferred Name - Districts can pull report
- User Profile Name - On the Top page of ESS

### ■ Emails

- Employee Email - TB, Credential, Absence Requests (requestor)
- User Email Address - Workflow email for approval, password resets, and Absence requests (approver)

## The "Hub" of Connections



## Who, What and Where?

- Compensation: Human Resources or Payroll
  - Salary Administration Plans: Salary Plan, Grade, Step, Compensation Rate
- Position Management: Human Resources or Finance
  - Salary Admin Plans, Position Number, Department, FTE/Stand Hrs, Class Indicator
- Department Budget Table (DBT): Human Resources or Finance
  - Position Number, Combination Codes
- Personal Data: Human Resources
  - Personal ID (EMPLID), Name
- Job Data: Human Resources
  - Position Number, EMPLID, Step, Efft Date, Action/Reason, Job Indicator, Benefit Record Number, Pay Group, Work Days
- Benefits: Benefits
  - EMPLID, Efft Date, Action/Reason, Job Indicator, Benefit Rcd Nbr, Benefit Plans, Rates
- Payroll: Payroll
  - EMPLID, Efft Date, Pay Group, Work Days, Position, Benefit Plans, Rates

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## Question: Job Data

- Job Data: Approximately how many tables does Job Data Reference?
  - A. 150
  - B. 50
  - C. 1000
  - D. 25
  
- Bonus Question: How many fields in Job Data
  - A. 150
  - B. 50
  - C. 1000
  - D. 25

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## The “Matrix”

Where does it start (Tables)	What is it (Fields)	COMPENSATION	POSITION	DEPT BUDGET TABLE	PERSONAL DATA	JOB	BENEFITS	ABSENCE MANAGEMENT	PAYSHEET	PAYCHECK
Compensation	Grade	0	X			X			X	
Compensation	Salary Admin Plan	0	X			X			X	
Position	Adds To FTE Actual Count		0			X				
Position	Classified Indicator		0			X	X			
Position	Company		0			X	X		X	X
Position	Department		0	X		X			X	X
Position	FTE		0			X	X		X	
Position	Full Time/Part Time		0			X	X	X		
Position	Location		0			X				X
Position	Position Number		0	X		X			X	X
Position	Reports To		0			X		X		
Position	Standard Hours		0			X	X	X	X	
Position	Business Unit		0			X	X			X
Position OR Job	Action		0			0	X		X	
Position OR Job	Effdt		0	X		0	X	X	X	
Personal Data	Personal ID (EMPLID)				0	X	X	X	X	X
Job	Absence System					0		X		
Job	Accrual Date*					0		X		
Job	Accrual Hours Factor					0		X		
Job	Action/Reason					0	X	X	X	X
Job	Job Indicator					0	X			X
Job	Original Start date*					0				
Job	Pay Group					0	X	X	X	X
Job	Step					0			X	
Job	Total Work days					0		X		
Job - SDCOE	Monthly check boxes					0			X	
<b>Time Reporter Data - ALL IMPACT TIMESHEET</b>										
Job Time & Labor	Effective date					0				X
Job Time & Labor	Time Period ID					0				X
Job Time & Labor	Workgroup					0				X
Job Time & Labor	Taskgroup					0				X

\* Defaults to Original Start Date (Effect Date of Initial Hire row)

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## The “Matrix”: Four Essentials

1. Position: All Fields go to Job Data
2. Job Data: All Fields go through Job
3. Effdt: Most impactful field
4. Payroll: Most Data ends up here

Where does it start (Tables)	What is it (Fields)	COMPENSATION	<sup>1</sup> POSITION	DEPT BUDGET TABLE	PERSONAL DATA	<sup>2</sup> JOB	BENEFITS	ABSENCE MANAGEMENT	<sup>4</sup> PAYSHEET	PAYCHECK
Compensation	Grade	0	X			X			X	
Compensation	Salary Admin Plan	0	X			X			X	
Position	Adds To FTE Actual Count		0			X				
Position	Classified Indicator		0			X	X			
Position	Company		0			X	X		X	X
Position	Department		0	X		X			X	X
Position	FTE		0			X	X		X	
Position	Full Time/Part Time		0			X	X	X		
Position	Location		0			X				X
Position	Position Number		0	X		X			X	X
Position	Reports To		0			X		X		
Position	Standard Hours		0			X	X	X	X	
Position	Business Unit		0			X	X			X
Position OR Job	Action		0			0	X		X	
Position OR Job	Effdt <sup>3</sup>		0	X		0	X	X	X	
Personal Data	Personal ID (EMPLID)				0	X	X	X	X	X
Job	Absence System					0		X		
Job	Accrual Date*					0		X		
Job	Accrual Hours Factor					0		X		
Job	Action/Reason					0	X	X	X	X
Job	Job Indicator					0	X			X
Job	Original Start date*					0				
Job	Pay Group					0	X	X	X	X
Job	Step					0			X	
Job	Total Work days					0		X		
Job - SDCOE	Monthly check boxes					0			X	
<b>Time Reporter Data - ALL IMPACT TIMESHEET</b>										
Job Time & Labor	Effective date					0				X
Job Time & Labor	Time Period ID					0				X
Job Time & Labor	Workgroup					0				X
Job Time & Labor	Taskgroup					0				X

\* Defaults to Original Start Date (Effect Date of Initial Hire row)

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## Activity and Review

- Using the Matrix, determine which Tables and fields need to be updated and which tables and groups may be effected in each scenario.
- Scenario 1:
  - Position 12345678 is being updated. Department is changing from 000 to 123, Reports to is changing from 12121212 to 21212121 and Standard Hours are changing from 24 to 26.5.
  - Answer: Starting with \_\_\_\_\_
    - Department: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
    - Reports To: \_\_\_\_\_ and \_\_\_\_\_
    - Standard Hours: \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

## Activity and Review

- Using the Matrix, determine which Tables and fields need to be updated and which tables and groups may be effected in each scenario.
- Scenario 2:
  - Employee ID 123456 transferred (promoted) to a position number 23456789. Their classified indicator did not change and employee class did not change. They were placed in Step 1.
  - Answer: Starting at \_\_\_\_\_
    - \_\_\_\_\_: \_\_\_\_\_, \_\_\_\_\_
    - \_\_\_\_\_: \_\_\_\_\_

### Activity and Review

- Using the Matrix, determine which Tables and fields need to be updated and which tables and groups may be effected in each scenario.
- Scenario 3:
  - Salary Plan 029, Grade 002 is being updated with a 2% increase across all steps. This change is effective 11/1/2017. There is currently only one person in that salary plan.
  - Answer: \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_

### Activity and Review

- Using the Matrix, determine which Tables and fields need to be updated and which tables and groups may be effected in each scenario.
- Bonus Scenario:
  - Classified manager, EMPLID 654321, was hired into the District on 9/4/2017. They were hired into position 23232323 which is a 1.0 FTE into department 345. Benefits is unable to enroll them in Medical/Dental/Vision because they do not see a "trigger".
  - Answer: Working Backwards \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_
  - \_\_\_\_\_ : \_\_\_\_\_

## Discussion

- Any questions?
- Additional Scenarios?
- Comments?
- Share Your Experiences?

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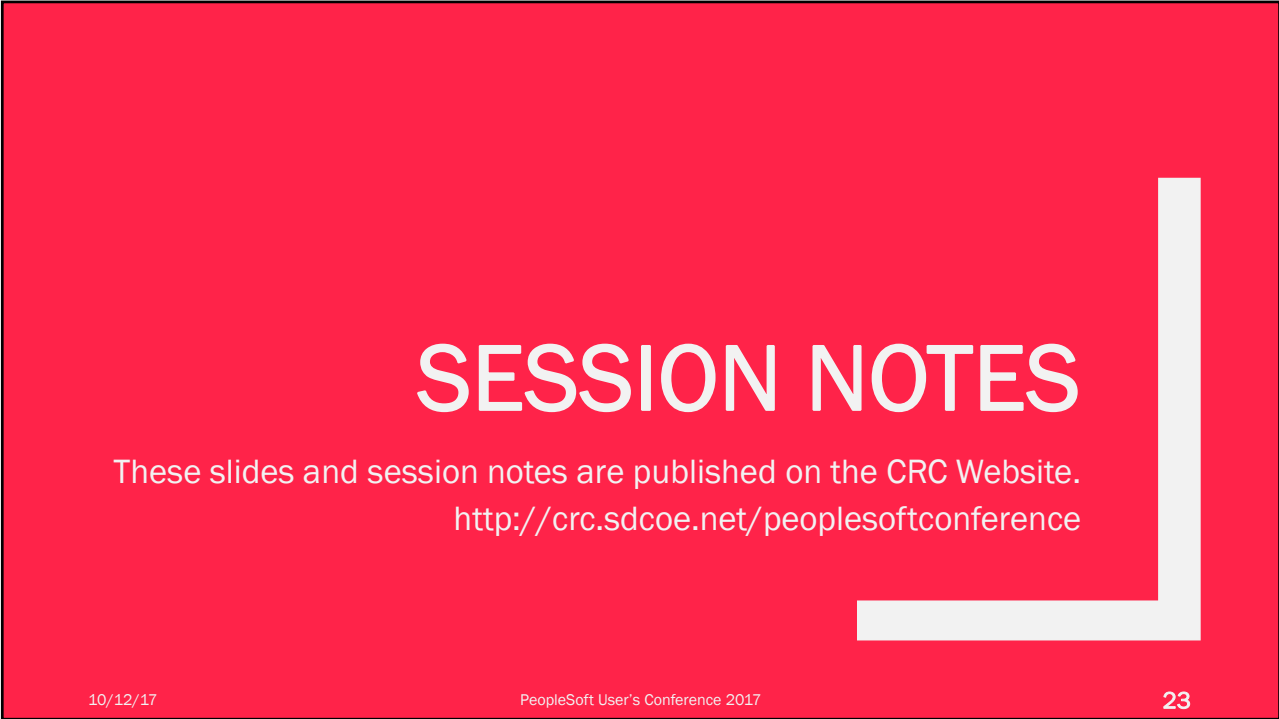
## In Closing...

- Get to know Who, What, Where.
- Job Data is a “Hub”. Many fields lead into it and several tables depend on the outflow of data.
- (Almost) all roads lead to Payroll.
- Enter (use) the Matrix

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# SESSION NOTES

These slides and session notes are published on the CRC Website.  
<http://crc.sdcoe.net/peoplesoftconference>

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